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LAWN AND GARDEN ACTIVITIES — 1980-81

	Lawn Care		Vegetable Gardening		Indoor Houseplants		Flower Gardening		Shrub Care		Fruit/Berry Growing	
	1980 %	1981 %	1980 %	1981 %	1980 %	1981 %	1980 %	1981 %	1980 %	1981 %	1980 %	1981 %
Total U.S.	52	65	43	47	40	51	37	47	31	43	21	30
Men	61	69	44	46	24	46	29	46	37	44	24	30
Women	44	63	41	47	48	55	43	48	26	41	19	29
18-19 yrs.	55	61	32	41	39	55	27	45	23	39	13	24
30-49 yrs.	60	69	45	48	38	53	41	47	38	45	26	32
50 and over	50	63	48	51	35	46	39	48	32	44	23	33
College	62	70	42	47	49	61	43	55	44	52	27	36
High School	51	65	42	46	34	49	36	45	26	41	20	27
Grade School	38	53	47	52	24	36	28	38	17	29	17	26
East	46	56	41	42	33	46	35	41	29	38	16	19
Midwest	61	74	54	55	40	56	40	57	33	44	21	33
South	52	64	42	49	32	42	33	41	31	41	20	27
West	46	65	28	41	44	63	39	50	32	50	31	45
Professional	62	74	43	48	50	63	46	58	45	58	28	37
Business	62	69	43	46	44	57	42	50	43	51	26	30
Clerical/Sales	54	61	37	38	42	49	35	42	28	41	19	21
Manual	52	65	42	47	35	49	34	44	28	38	19	27
Retired	48	72	50	52	33	48	38	49	26	46	22	34

NA = Not Available.
Source: Gardens for All/Gallup Organization Survey.

Relationship of incomes and activities

(Incomes of households' principal wage earners)

	Lawn Care		Vegetable Gardening		Indoor Houseplants		Flower Gardening		Shrub Care		Fruit/Berry Growing	
Annual Income	1980	1981	1980	1981	1980	1981	1980	1981	1980	1981	1980	1981
Over $20,000	63%	77%	48%	53%	44%	60%	44%	57%	43%	38%	31%	36%
Under $20,000	47%	56%	40%	43%	33%	45%	32%	40%	25%	32%	16%	25%

Source: Gardens for All/Gallup Organization Survey.

Gallup reports:

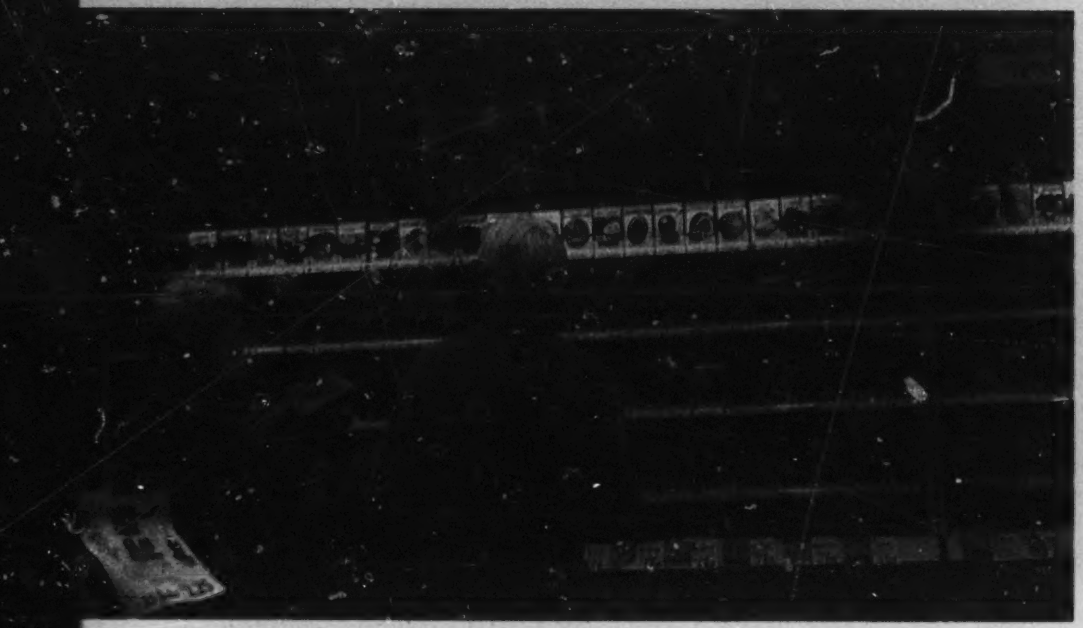
Record number of vegetable gardeners

■Forty-seven percent of all American households planted food gardens this year, bringing to 38 million the number of dining tables presumably graced with garden-fresh vegetables. More Americans planted vegetables this year than ever before in the history of the United States. More gardens, but the average starting size of the gardens is smaller: 547 square feet, compared with 663 square feet, average starting-size garden, in 1980.

These and other key facts and figures were obtained by the Gallup Organization, Princeton, N.J., in an annual, nationwide survey sponsored by Gardens for All, the National Association for Gardening, Burlington, Vt.

Profile of the 1981 vegetable gardener appearing most responsible for the increased number of gardens shows a woman in the 18-29 years age bracket, probably college educated inasmuch as the professional category presents the greatest percentage-increase, and living in

continued...



Shopping for vegetable varieties is interesting. Over half of the retired people are now engaged in food gardening.

More young women are growing vegetables than ever before in the United States.

Record number ...continued

In 1981 ten percent more men were involved in flower gardening compared with 1980.

the West. In 1980, western food-gardening interest dipped somewhat. The differences in percentages in these classifications appear very slight. All groups contributed to the rising interest in producing family food and becoming, to a degree, independent of an unpredictable economy.

"Just as the pressures of the war years produced the Victory Garden, today's many uncertainties and changing values are creating the Independence Garden. People seem to be rebuilding America backyard by backyard," says Dave Schaefer of Gardens for All.

Jack Robinson, president of Gardens for All, analyzed survey results this way: "All kinds of gardening—flower gardening, lawn care, indoor houseplants—are up significantly in our survey this year...People want to do more for themselves and make the best of their property. The ability to be creative and productive with what you have at home is a simple gift that is rediscovered whenever we experience tough times."

$16 billion in retail value

In dollars, the retail value of vegetables from home gardens was $16 billion, 23 percent more than in 1980, and an average yield of $368 per garden. "Saving money" was listed as a prime instigation for gardening, with "better tasting food," and "enjoyment" given as other principal reasons. According to the survey, vegetable gardening is the fifth most popular leisure pursuit in America, of 32 considered activities. Some, or all, of these reasons induced an additional seven million families in 1981 to grow vegetables in containers. Fifty-three percent of the conventional food-gardeners reported household incomes over $20,000. More fruit and berry growers also are in the over-$20,000 bracket, but those reporting a lower income apparently have increased in this gardening category.

Flower gardening continues as a popular pastime for the number of households equivalent to those engaged in growing vegetables: 47 percent. Lawn care showed the biggest jump, 1981 compared with 1980, in the women's category (19 percent difference), in the West (17 percent difference), and by retired people (14 percent difference). Approximately two-thirds of all American families care for lawns, with care of shrubs a logical adjunct involving increasing numbers of those who, heretofore, may have been only reluctant mowers of grass. □

AAN reports on plant sales data

Sixty-nine percent of the retailers completing the 1981 survey conducted by the American Association of Nurserymen reported that they had ordered more plants for spring, '81, than for the same season, 1980. Fifty-three percent of the respondents carried the same or less amount of green goods into the present season than they did last year.

Of the approximately 1500 AAN member firms surveyed, 135 more retailers responded this year: 619 national responses (41 percent) vs. 484 (32 percent) in 1980.

Regionally, south-southwest Region E provided the highest percentage of increase-affirming respondents: 89 percent reporting increased spring ordering. A 29 percent increase above 1980 in numbers of firms reporting fall carryover appears less optimistic. In a region where seasons sometimes merge, retailers may be less concerned than, elsewhere.

Except for Regions D and F (each, 2 percent fewer), those regions where seasons are more sharply defined reported an average of 6.5 percent more retailers showing a decreased carryover, reinforcing indications of increased spring sales.

Barring mountain areas, the California-Hawaii-Arizona-Nevada Region G enjoys transseasonal temperatures similar to south-southwest Region E. Region G, however, reported a healthy 21 percent of the AAN retailers carrying fewer plants into this season than in fall, 1980. Region G also indicated a large percentage (61 percent) increasing their orders over a year ago.

During their 1980-81 national public relations program, the AAN continued to encourage retailer-emphasis on the green gifts of nature; and to stress the significant role landscaping plays in increased property values.

REGIONAL STATISTICS

Region A (Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, New York, New Jersey, Pennsylvania, Delaware, Quebec)

Spring 1981 Purchases	Spring 1980 Purchases
MORE 115 firms (76%)	MORE 53 firms (59%)
LESS 35 firms (24%)	LESS 12 firms (13%)
SAME 2 firms (.003%)	SAME 6 firms (7%)
Fall 1981 Carryover	**Fall 1980 Carryover**
MORE 65 firms (43%)	MORE 40 firms (44%)
LESS 42 firms (28%)	LESS 19 firms (21%)
SAME 45 firms (30%)	SAME 31 firms (34%)

Region B (Maryland, Virginia, West Virginia, Kentucky, District of Columbia, Tennessee, North Carolina, South Carolina, Florida, Georgia, Alabama, Mississippi)

Spring 1981 Purchases	Spring 1980 Purchases
MORE 88 firms (77%)	MORE 50 firms (61%)
LESS 24 firms (22%)	LESS 11 firms (13%)
SAME 3 firms (3%)	SAME 9 firms (11%)
Fall 1981 Carryover	**Fall 1980 Carryover**
MORE 66 firms (57%)	MORE 50 firms (61%)
LESS 19 firms (17%)	LESS 14 firms (17%)
SAME 30 firms (26%)	SAME 18 firms (22%)

Region C (Ohio, Indiana, Illinois, Michigan, Wisconsin, Ontario)

Spring 1981 Purchases	Spring 1980 Purchases
MORE 79 firms (56%)	MORE 73 firms (67%)
LESS 58 firms (41%)	LESS 20 firms (18%)
SAME 5 firms (4%)	SAME 10 firms (9%)
Fall 1981 Carryover	**Fall 1980 Carryover**
MORE 58 firms (42%)	MORE 40 firms (37%)
LESS 48 firms (34%)	LESS 29 firms (27%)
SAME 34 firms (24%)	SAME 39 firms (36%)

Region D (Minnesota, North Dakota, South Dakota, Iowa, Nebraska, Missouri, Kansas, Colorado, Wyoming, Saskatchewan, Manitoba)

Spring 1981 Purchases	Spring 1980 Purchases
MORE 73 firms (68%)	MORE 52 firms (63%)
LESS 30 firms (28%)	LESS 17 firms (21%)
SAME 4 firms (4%)	SAME 7 firms (9%)
Fall 1981 Carryover	**Fall 1980 Carryover**
MORE 45 firms (42%)	MORE 45 firms (55%)
LESS 28 firms (26%)	LESS 23 firms (28%)
SAME 34 firms (32%)	SAME 14 firms (17%)

Region E (Texas, Louisiana, Arkansas, Oklahoma, New Mexico)

Spring 1981 Purchases	Spring 1980 Purchases
MORE 41 firms (89%)	MORE 13 firms (68%)
LESS 5 firms (11%)	LESS 3 firms (16%)
SAME -0-	SAME 1 firm (5%)
Fall 1981 Carryover	**Fall 1980 Carryover**
MORE 31 firms (67%)	MORE 10 firms (53%)
LESS 3 firms (6%)	LESS 5 firms (26%)
SAME 12 firms (26%)	SAME 4 firms (21%)

Region F (Oregon, Washington, Montana, Idaho, Utah, Alaska, Alberta, British Columbia)

Spring 1981 Purchases	Spring 1980 Purchases
MORE 11 firms (42%)	MORE 22 firms (65%)
LESS 14 firms (54%)	LESS 7 firms (21%)
SAME 1 firm (4%)	SAME 1 firm (3%)
Fall 1981 Carryover	**Fall 1980 Carryover**
MORE 14 firms (56%)	MORE 14 firms (41%)
LESS 4 firms (16%)	LESS 6 firms (18%)
SAME 7 firms (28%)	SAME 13 firms (38%)

Region G (California, Hawaii, Arizona, Nevada)

Spring 1981 Purchases	Spring 1980 Purchases
MORE 17 firms (61%)	MORE 10 firms (53%)
LESS 10 firms (26%)	LESS 5 firms (26%)
SAME 1 firm (4%)	SAME 1 firm (5%)
Fall 1981 Carryover	**Fall 1980 Carryover**
MORE 12 firms (43%)	MORE 9 firms (47%)
LESS 9 firms (32%)	LESS 2 firms (11%)
SAME 7 firms (25%)	SAME 8 firms (42%)

1979-80 Volume – Vegetable Types

State	Production Area				Flats Sold		Percent of Sales at Wholesale		Wholesale Price		Value of Sales at Wholesale[1]	
	1979	1980	Intended 1981	1981 as % of 1980	1979	1980	1979	1980	1979	1980	1979	1980
	1,000 Sq. Ft.			Percent	1,000 Flats		Percent		Dollars		1,000 Dollars	
Calif.	1,997	1,800	1,782	99	1,663	1,280	100	99	4.47	4.64	7,434	5,939
Colo.	294	265	267	101	166	125	48	71	4.81	4.04	798	505
Conn.	512	743	741	100	306	458	74	85	3.86	4.07	1,181	1,864
Fla.	737	640	643	100	459	596	95	100	4.43	3.59	2,033	2,140
Ga.	202	413	475	115	103	227	87	86	3.99	4.14	411	940
Ill.	533	576	585	102	319	295	70	63	3.88	4.10	1,238	1,210
Ind.[3]	357	452	503	111	168	228	39	49	4.14	4.50	696	1,026
Iowa	250	283	287	101	160	152	39	42	5.06	7.01	810	1,066
Kans.[3]	156	184	143	78	57	67	38	52	5.22	5.69	298	381
Md.	303	233	212	91	196	152	87	74	4.20	4.27	823	649
Mass.[3]	549	751	749	100	293	412	39	36	3.90	4.66	1,143	1,920
Mich.	2,593	2,379	2,506	105	1,589	1,427	80	84	3.40	3.72	5,403	5,308
Minn.	457	717	788	110	195	311	40	54	4.71	5.56	918	1,729
Mo.[3]	448	448	459	102	259	259	84	78	4.95	4.95	1,282	1,282
N.J.	233	815	805	99	117	342	61	74	4.28	4.74	501	1,621
N.Y.	1,227	1,224	1,235	101	621	699	68	62	4.19	4.77	2,602	3,334
N.C.	700	646	605	94	331	389	85	86	3.87	4.46	1,281	1,735
Ohio	2,050	2,609	2,636	101	1,030	1,348	80	77	3.59	4.21	3,698	5,675
Ore.	358	239	222	93	145	118	86	81	5.26	6.37	763	752
Pa.	643	636	656	103	311	415	75	62	4.32	3.30	1,344	1,370
Tenn.	232	268	277	103	147	214	81	72	4.27	4.31	628	922
Tex.	1,374	741	744	100	901	587	99	97	5.10	5.53	4,595	3,246
Va.[3]	350	339	346	102	238	243	69	64	4.37	4.63	1,040	1,125
Wash.	318	315	319	101	115	132	84	76	5.01	5.94	576	784
Wis.	343	330	333	101	183	197	49	61	4.76	4.87	871	959
Total	**17,216**	**18,046**	**18,318**	**102**	**10,072**	**10,873**	**80**	**78**	**4.21**	**4.45**	**42,367**	**47,482**

[1]Equivalent wholesale value of all sales.
[2]1979 Revised.
[3]Does not include "Open Acreage" grown outdoors.
Source: Crop Reporting Board, USDA.

Bedding plant production leveled off in '80

Data presented are from the comprehensive report published by the Crop Reporting Board of the USDA in which information provided by commercial growers in major producing states has been summarized. ■ Wholesale sales of vegetable bedding plants in 1980 increased six percent from 1979. This year's rate of increase is 10 percent slower than reported in 1979, although sales have continued to climb since the 10 percent dip in number of flats sold in 1978.

The wholesale price-per-flat increase also was less in 1980 than in 1979; unit prices rose an average of 24 cents, 5 percent higher, 1980, after jumping 44 cents in the previous year. This is another indication that the rate-of-rise is slowing in the industry – in this case, almost 50 percent.

Ohio showed a 53 percent increase in the number of flats sold, 1980, compared with 1979. Highest increase reported, this represented, in terms of value of the flats at wholesale, 39 percent of the total wholesale value of flats sold by all reporting states, 1980 over 1979.

Missouri reported no change in 1980 over the previous year. The direction, however, was up for all but seven states. Of those states reporting decreased sales of flats in 1980, California, down 30 percent, and Texas, 53 percent, were last on the list.

For purposes of their report, the USDA defines commercial growers as those reporting $10,000 or more

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1979-80 Volume – Flowering-Foliar Types

State	Production Area				Flats Sold		Percent of Sales at Wholesale		Wholesale Price		Value of Sales at Wholesale[1]	
	1979	1980	Intended 1981	1981 as % of 1980	1979	1980	1979	1980	1979	1980	1979	1980
	1,000 Sq. Ft.			Percent	1,000 Flats		Percent		Dollars		1,000 Dollars	
Calif.[2]	6,200	8,000	8,088	101	4,961	4,498	99	96	4.71	5.92	23,366	26,628
Colo.	1,128	1,119	1,219	109	559	575	55	83	4.80	4.81	2,683	2,766
Conn.[2]	917	978	956	98	597	619	77	77	3.97	4.19	2,370	2,594
Fla.[2]	1,503	1,411	1,401	99	1,065	1,151	100	100	4.54	4.03	4,835	4,639
Ga.	541	720	872	121	270	381	85	87	3.67	4.17	991	1,589
Ill.	1,534	1,419	1,477	104	924	759	80	71	4.25	4.46	3,927	3,385
Ind.[2]	648	881	964	109	322	417	50	57	4.14	4.39	1,333	1,831
Iowa	469	496	499	101	228	253	52	51	5.41	6.97	1,233	1,763
Kans.[2]	351	376	401	107	147	157	67	61	6.18	7.12	908	1,118
Md.	945	911	943	104	579	456	80	66	3.56	4.56	2,061	2,079
Mass.	1,410	1,350	1,345	100	731	749	51	39	4.26	4.06	3,114	3,041
Mich.[2]	6,940	6,883	7,076	103	3,998	4,268	86	87	3.43	3.86	13,713	16,474
Minn.	1,675	1,550	1,658	107	654	695	44	59	5.13	5.40	3,355	3,753
Mo.[2]	822	931	956	103	518	533	85	86	4.80	4.86	2,486	2,590
N.J.	504	1,668	1,673	100	233	796	58	78	5.21	4.77	1,214	3,797
N.Y.	2,255	2,683	2,729	102	1,114	1,544	65	63	4.28	4.97	4,768	7,674
N.C.[2]	933	1,184	1,412	119	528	618	86	89	4.47	4.63	2,360	2,861
Ohio	6,500	6,215	6,240	100	3,300	3,241	84	82	3.75	4.11	12,375	13,321
Ore.	661	554	554	100	296	267	94	82	5.61	6.59	1,66[illegible]	1,760
Pa.	1,404	1,732	1,754	101	695	1,245	75	67	4.29	4.19	2,982	5,217
Tenn.	456	567	584	103	260	410	82	78	4.21	4.23	1,005	1,734
Tex.	1,649	1,184	1,239	105	1,265	1,008	99	95	5.25	6.09	6,641	6,139
Va.[2]	640	682	672	102	410	485	81	75	4.66	4.73	1,911	2,199
Wash.	1,163	1,018	1,077	106	538	521	87	85	5.08	5.72	2,733	2,980
Wis.	878	923	924	100	512	561	80	68	4.91	5.07	2,514	2,844
Total	**42,126**	**45,415**	**46,713**	**103**	**24,704**	**26,187**	**83**	**81**	**4.32**	**4.76**	**106,629**	**124,778**

[1]Equivalent wholesale value of all sales.
[2]1979 Revised.
[3]Does not include "Open Acreage" grown outdoors.
Source: Crop Reporting Board, USDA.

Bedding plants

continued from page 18

in gross sales of the green goods in question. During 1980 commercial growers of vegetable bedding plants dwindled by 91, nationwide. For this year, the remaining 2500 plus growers have planned an estimated increase in production area of two percent or 272,000 sq. ft. (approximately six acres) which is relatively insignificant.

During 1980 the wholesale sales of flowering and foliar types of bedding plants also increased six percent in 1980 to 26.2 million flats from 24.7 in 1979. This has a different connotation, however. For these types of bedding plants vs. the vegetable type, the "good" and "gloomy" years reversed; sales dipped four percent in 1979, flowering-foliar, rather than in 1978, when sales of vegetable bedding flats dropped.

The average wholesale price per flat increased 44 cents over the 1979 figure to $4.76, 1980. In 1980, flats showed a higher return in Kansas, at $7.12 wholesale, and were a buyer's bargain at $3.86 in Michigan, the only state staying below $4 per flat. Nationwide, the overall increase in price plus greater production resulted in a 17 percent larger wholesale value of $125 million.

Of this amount, California garnered the largest share – $26.6 million, over 20 percent – although the wholesale units sold in that state decreased in number.

The number of producers has been reduced in more than one half of those states economically concerned with flowering-foliar types of bedding plants. Only Kansas reported no change. Even with fewer growers, increased acreage has been scheduled for this year's production, with Georgia and North Carolina projecting plans for the greatest expansion. □

Product movement report:

Shown in the tables here are indicators of 1981 business volume in basic lines of merchandise by key garden centers, and key outdoor power equipment dealers. The data shown are for the individual companies reporting. The numbers CANNOT BE PROJECTED to represent the total market, even within the regions in which they are located. Not represented in this report are the sales and inventory increases or decreases in hardware/home centers and in multi-department stores. The reporting period is for January through July, 1981.

Definitions

● **Garden centers** = Retail outlets specializing in the broad line of lawn and garden products including fertilizer, chemicals, tools, garden hose and accessories, etc. Most depend heavily on sales of green goods. Some of the garden centers handle small quantities of outdoor power equipment. This classification does not include the lawn and garden departments of home centers or other multi-department stores.

● **Outdoor Power Equipment Dealers** = Retailers whose main business is selling and servicing gasoline-powered lawn, garden and grounds equipment. Some of them handle small quantities of fertilizer, chemicals and other products shown in this report. However, due to insignificant quantities handled, they are not shown in the tables.

WEST

Percent Change between 1980 and '81

	Sales	End-of-Season Inventory
Garden Center #1		
Walk-behind Mowers	NA	NA
Spin Trimmers	−46	DNA
Lawn Fertilizer	+12	DNA
Outdoor Chemicals	+26	DNA
Garden Tools	− 4	DNA
Watering Equipment	+23	DNA
Garden Center #2		
Walk-behind Mowers	NA	NA
Spin Trimmers	NA	NA
Lawn Fertilizer	+21	− 14
Outdoor Chemicals	+20	+ 10
Garden Tools	−15	+ 9
Watering Equipment	−25	− 79
Garden Center #3		
Walk-behind Mowers	− 7	− 17
Spin Trimmers	− 8	− 14
Lawn Fertilizer	+25	+ 20
Outdoor Chemicals	NA	NA
Garden Tools	No change	+ 20
Watering Equipment	No change	No change
OPE Dealer #1		
Walk-behind Mowers	+15	+ 90
Spin Trimmers	−10	+ 13
OPE Dealer #2		
Walk-behind Mowers	+11	− 19
Spin Trimmers	−16	− 25
OPE Dealer #3		
Walk-behind Mowers	+19	+ 54
Spin Trimmers	+46	+133
OPE Dealer #4		
Walk-behind Mowers	− 9	− 5
Spin Trimmers	−21	− 30

SOUTH

Percent Change between 1980 and '81

	Sales	End-of-Season Inventory
Garden Center #1		
Walk-behind Mowers	− 34	DNA
Spin Trimmers	+ 88	DNA
Lawn Fertilizer	+ 11	DNA
Outdoor Chemicals	− 10	DNA
Garden Tools	+ 14	DNA
Watering Equipment	+ 44	DNA
Garden Center #2		
Walk-behind Mowers	.....	.....
Spin Trimmers	.....	.....
Lawn Fertilizer	− 28	+ 6
Outdoor Chemicals	− 12	+ 6
Garden Tools	− 6	+ 6
Watering Equipment	− 5	+ 6
Garden Center #3		
Walk-behind Mowers	+ 15	+ 10
Spin Trimmers	− 6	+100
Lawn Fertilizer	+ 7	+.....
Outdoor Chemicals	+ 3	+ 13
Garden Tools	+ 9	.....
Watering Equipment	+ 20	.....
Garden Center #4		
Walk-behind Mowers	.....	.....
Spin Trimmers	.....	.....
Lawn Fertilizer	+ 13	− 33
Outdoor Chemicals	.....	.....
Garden Tools	+ 7	.....
Watering Equipment	− 29	+ 67

spring and summer

■Although the nation's homemakers took to gardening and lawn care in greater numbers in 1981 than in 1980, they were cautious in their spending on high-ticket items for lawn and garden activities.

Reports to **Lawn & Garden Marketing** from specialty retailers showed, however, that this business held up well, considering the general economic downturn. Sales held steady or did not drop as much as in

continued...

NORTHEAST

Percent Change between 1980 and '81

OPE Dealer	Sales	End-of-Season Inventory
OPE Dealer #1		
Walk-behind Mowers	+45.8	– 36
Spin Trimmers	+32.4	– 80
OPE Dealer #2		
Walk-behind Mowers	–19	– 29
Spin Trimmers	+20	+ 44
OPE Dealer #3		
Walk-behind Mowers	– 9	+ 67
Spin Trimmers	+15	– 46
OPE Dealer #4		
Walk-behind Mowers	+17.4	– 50
Spin Trimmers	–76.9	– 71
Garden Center #1		
Walk-behind Mowers	–18	– 44
Spin Trimmers	–17	+ 20
Lawn Fertilizer	+14	+135
Outdoor Chemicals	+20	– 10
Garden Tools (non-power)	+17	– 25
Watering Equipment	+11.1	– 29
Garden Center #2		
Walk-behind Mowers	+25	+133
Spin Trimmers	+67	+350
Lawn Fertilizer	+26	NA
Outdoor Chemicals	+33	NA
Garden Tools	+15	+ 67
Watering Equipment	+ 8	+ 96

NORTH CENTRAL

Percent Change between 1980 and '81

	Sales	End-of-Season Inventory
Garden Center #1		
Walk-behind Mowers	– 27	– 45
Spin Trimmers	+ 12	+100
Lawn Fertilizer	+ 36	+ 22
Outdoor Chemicals	+ 73	+ 57.4
Garden Tools	+ 7	– 1
Watering Equipment	– 10	+ 82
Garden Center #2		
Walk-behind Mowers	.....	.....
Spin Trimmers	– 41	– 37
Lawn Fertilizer	+ 73	+150
Outdoor Chemicals	+ 14	– 23
Garden Tools	+ 24	.....
Watering Equipment	– 12	+125
Garden Center #3		
Walk-behind Mowers	– 32	+208
Spin Trimmers	– 23	– 18
Lawn Fertilizer	+ 6	+ 39
Outdoor Chemicals	+ 22	+ 10
Garden Tools	+ 23	– 43
Watering Equipment	– 10	– 33
OPE Dealer #1		
Walk-behind Mowers	+ 14	+ 41
Spin Trimmers	– 51	– 58
OPE Dealer #2		
Walk-behind Mowers	– 15	– 33
Spin Trimmers	+ 46	+250
OPE Dealer #3		
Walk-behind Mowers	+ 79	+100
Spin Trimmers	+150	.....
OPE Dealer #4		
Walk-behind Mowers	+ 68	– 31
Spin Trimmers	+ 39	– 62
OPE dealer #5		
Walk-behind Mowers	+ 28	+ 50
Spin Trimmers	+ 7	– 6

	Sales	End-of-Season Inventory
OPE Dealer #1		
Walk-behind Mowers	+ 9	+ 75
Spin Trimmers	+ 11	– 67
OPE Dealer #2		
Walk-behind Mowers	+ 6	+ 11
Spin Trimmers	+100	+ 40
OPE Dealer #3		
Walk-behind Mowers	+ 17	– 80
Spin Trimmers	+ 25	– 84

	Sales	End-of-Season Inventory
OPE dealer #4		
Walk-behind Mowers	– 10	– 38
Spin Trimmers	.....	.....
OPE Dealer #5		
Walk-behind Mowers	+ 19	+ 75
Spin Trimmers	+ 17	.....
OPE Dealer #6		
Walk-behind Mowers	– 13	NA
Spin Trimmers	+ 6	NA

The "Best Seller" list

The reporting retailers listed the following as products which generated exceptionally good sales in the 1981 season.

GARDEN CENTERS

Northeast
Lawn fertilizers
Outdoor chemicals (especially for gypsy moths)
Lawn mowers
Tractors
Fertilizer
Chain saws
Wheelbarrows
Private brand lawn fertilizers
Short handle gardening tools, pruners, trowels, etc.

North Central
Lawn fertilizer
Chemicals
Gasoline-powered trimmers
Garden seeds
Vegetable plants
Grass seed
Lawn spreaders
Mulches
Landscape timbers
Electric bug killers
Gas grills
Seeds
Sets
Bulbs
Fruits—large and small
Bedding plants

South
Bedding plants (especially 4-in. and 6-in. size)
Nursery stock (trees and shrubs)
Spring-planted bulbs (caladiums, canna, gladiola, dahlia, etc.)
Bedding plants
Tillers
Nursery and greenhouse items
Hardgoods
Outdoor chemicals

West
Grasshopper spore (Reuter)
Ortho Kleenup (in ready-to-use sprayer)
Rapid-Gro
Ames hand trowels
Rose food
Colorado's Own Benomyl
Henri fountains and bird baths
Ortho Funginex
Terra-Lite professional potting soil
Entek Super Soaker

POWER EQUIPMENT DEALERS

Northeast
Chain saws
Riding mowers
Tillers
Lawn fertilizer
Trimmers
Lawn mowers
Gasoline-powered spin trimmers
Gasoline chain saws
Ribbon lawn compact hose
Bug killers
Outdoor gas grills
Bobcat commercial mowers
Gravely 4-wheel tractors
Snapper walk-behind mowers

North Central
Wheel Horse tractors
Lawn Boy lawn mowers
Snapper riders
Commercial heavy-duty walk-behind mowers
Commercial gas-powered spin trimmers
Toro mowers
Gasoline-powered line trimmers

South
Leaf blowers
Trimmers
Blowers
Stihl chain saws and trimmers
Kero-Sun heaters
Toro mowers
Ariens rear-engine riders
Lawn Boy mowers and trimmers
Snapper mowers
Green Machine trimmers
Kero-Sun heaters
Toro
John Deere
Lawn Boy
Snapper
Echo and John Deere trimmers

West
11-h.p. and above mowers
Snapper walk-behind mowers
Gilson rear-tine rototillers
Toro sprinkler systems for do-it-yourselfers
Stihl brushcutters

many other consumer lines.

Using as a barometer the feedback from the reporting retailers, it appears that the outdoor power equipment dealers in the North Central and in the South, with the exception of Florida, made some gains in sales following the drought of 1980. Data from Florida confirm other reports from that state that sales of lawn mowers were slow even after rains broke the dry spell of 1980 and early 1981.

Garden centers, as expected, fared less well in selling power equipment, owing to minimal emphasis on service and breadth of line, and less product dominance. But the garden centers showed gains in fertilizer, chemicals and garden tools.

Gypsy moth controls

In the Northeast, gypsy moths made the news pretty consistently, and gypsy moth control products were among the best sellers for garden centers. The progressive garden center operators offered not only chemical control products, but also non-toxic devices such as traps and even burlap, which can be used to wrap around trees as a control system.

From the Washington, D.C. area a retailer wrote: "...hardgoods were up, overall, mainly due to ideal weather compared to rain all through spring of 1980."

From Florida, a power equipment dealer wrote, "...we had a dry spring and early summer. Sales were hard to make with the drought. We worked extra hard and gave customers extra good service to increase sales through these times."

From California came these comments, which confirmed previous reports of a slowdown there in business for the specialty retailers: a garden center manager wrote, "We moved...and added green goods to our inventory mix. Homeowner and commercial sales have been slow for the last two years." And a power equipment dealer in California said that his total unit sales in power equipment were down 12 percent and dollar volume was down six percent. □

Table 1 **Product groups expected to show most growth**

	All Stores %*	National %*	Traditional %*	Discount %*	Variety %*	Supermarket %*	Drug Store %*	Auto Supply %*
Nursery stock	15	12	5	33	5	32	19	...
Garden tools	9	4	10	11	14	14	3	8
Patio and outdoor living	21	4	38	34	19	14	17	8
Snow removal equipment	1	...	...	...	...	...	...	3
Power equipment, hand-held	9	4	8	3	5	...	...	19
Outdoor power equipment	20	40	20	11	11	4	...	43
Watering equipment	5	4	...	3	5	7	8	5
Irrigation equipment	1	...	...	1	...	...	3	...
Garden chemicals	7	4	5	12	5	7	14	1
Fertilizer	5	12	5	9	3	11	3	1
Soil amendments	1	...	...	3	3	4	...	...
Garden supplies	4	8	5	5	3	11	6	...
Indoor plant accessories	2	...	3	3	3	14	...	...
Energy products	14	24	13	14	11	...	17	15
Gifts, holiday decor	3	...	3	3	16	...	3	...

*Adds to more than 100.0% due to multiple responses.
Source: LGM surveys

Definitions—Multi-department stores

NATIONAL DEPARTMENT STORES—Sears, Montgomery Ward, J. C. Penney...

TRADITIONAL DEPARTMENT STORES—Macy's, Marshall Field's, Gimbel's, etc.

DISCOUNT DEPT. STORES—K-Mart, Woolco, Venture..

AUTO SUPPLY CHAINS—Western Auto, OTASCO...

VARIETY STORES—Woolworth's...

Product Groups

For more detail on the products included in the categories in table 1, see page 36.

In volume buyers' view

Most growth potential is in patio and OPE

Multi-department store buyers rank growth potential of selected product lines. This report also includes ranking of factors in taking on a product line, and buyers' tenure in current positions.

■Patio living products and outdoor power equipment are the best hope as growth products by buyers of lawn and garden merchandise for multi-department stores. This is the view of the buyers for these stores who responded to a survey conducted early this year. The survey asked for their predictions of products that would show the "most growth" for the years 1981 and 1982.

Twenty-one percent of the buyers saw patio products as the fastest growing line and 20 percent saw power equipment as the fastest growing during the two-year period. (See table 1.)

Forty-three percent of the buyers for the auto supply chains and 40 percent of those for the national department stores saw outdoor power equipment as the best growth line. Buyers for the traditional department stores were most optimistic about upcoming sales of patio and outdoor living products—with 38 percent of these buyers naming these lines as their most-growth area; 34 percent of the discount store buyers expected most growth here, too.

Evaluating all the products

Looking at the product lines—nursery stock through energy products—it can be seen how the various types of multi-department stores rank growth possibilities. It can be seen that the discount stores and supermarkets place their highest expectations in nursery stock (including plants, seed, indoor plants and all green goods).

In both of these types of retail outlets, about one-third of the buyers expected the nursery products to show the most growth. One out of five of the drug store buyers saw green goods as the best growth area.

Discount stores, variety stores and supermarkets showed higher expectations of increasing sales of garden tools than did the other types of retailers included in this survey.

In looking for growth lines, the variety store and the drug store buyers also ranked patio and outdoor living products as the best choice for the two-year period.

None of the respondents expected notable growth of sales on snow removal equipment.

Not hot on hand-held power

In the category of hand-held power equipment (spin trimmers and power blowers, shrub and hedge trimmers are in this category) the buyers for the auto supply stores proved to be the most bullish with 19 percent of them looking for best growth here. It was noted that the auto supply store buyers also looked for best growth in other OPE lines.

Watering equipment, which is handled by at least 80 percent of

continued...

Table 2 **Important factors in taking on a product**

	All Stores %*	National %*	Tradi-tional %*	Discount %*	Variety %*	Super-market %*	Drug Store %*	Auto Supply %*
Proved consumer acceptance	59	52	43	58	70	61	61	65
Profit margin	29	16	35	28	30	21	33	29
Reputation of manufacturer	26	28	45	14	19	14	31	31
National brand name	19	16	33	19	22	18	11	16
Production/delivery capabilities	14	12	25	18	11	14	8	9
National advertising	12	4	18	10	11	29	19	7
Co-op ad program	11	...	23	10	8	11	8	13
Packaging	8	12	3	11	11	11	11	1
POP displays	6	8	10	6	11	...	6	3
Other	5	12	...	3	8	4	...	7

*Adds to more than 100.0% due to multiple responses.

Table 3
Number of years buying lawn and garden products for company

	All Stores %	National %	Tradi-tional %	Discount %	Variety %	Super-market %	Drug Store %	Auto Supply %
1 year	5	12	10	6	5	...	...	1
2 to 4	15	16	18	20	11	36	8	5
5 to 9	22	20	23	32	19	14	22	16
10 to 14	17	12	18	14	19	14	14	21
15 to 24	23	24	18	17	24	18	42	29
25 years or more	15	16	13	5	16	18	11	25
Median (years)	12	11	10	8	13	10	16	17

Source: LGM Survey, 1981.

Volume buyers' view

...continued

lawn and garden products retailers, was not seen as a big growth category by a significant number of the respondents in this survey.

Fourteen percent of the drug store buyers and 12 percent of the discount store buyers saw garden chemicals as a best growth line. Looking at fertilizer, 12 percent of the national department store buyers and 11 percent of the supermarkets saw this product line at the top, from a growth standpoint.

Few of the buyer types saw soil amendments (peat moss, gypsum, etc.) on a fast growth track. It appears, however, that supermarkets may continue to expand their offerings of the very broad category called garden supplies (11 percent saw this as best growth) and of indoor plant accessories.

Energy products: a new beacon

Energy products, which include the new generation of wood stoves and kerosene stoves, seem to offer a new beacon of sales opportunities for significant numbers of these buyers. Almost one out of four of the national department store buyers saw energy products as their best growth potential; 17 percent of the drug store buyers, 15 percent of the auto supply buyers and 14 percent of the discount store buyers were looking to the energy lines as leading in sales volume increase.

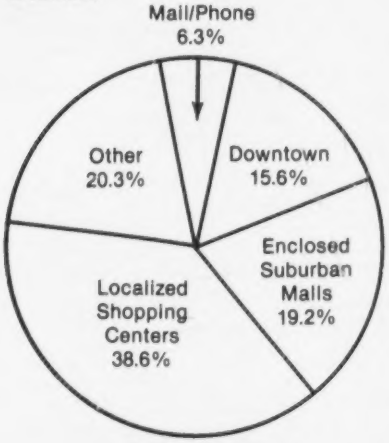
Of all the multi-department store buyers it was only among the variety store buyers that a significant number (16 percent) saw the gifts and holiday decor products as best possibilities for sales growth.

Other data from this survey show the buyers' ranking of the importance of various factors when considering taking on a new product (Table 2) and the buyers' tenure in their current positions (Table 3).

Consumer acceptance outranked all the other factors by far in the buyers' evaluations, followed by these other top-ranking considerations: profit margin, reputation of the manufacturer and national brand name. □

Place of purchase data

■Hardgoods items are purchased more frequently at localized shopping centers (all surburban shopping centers that are not enclosed regional malls) than at any other location.



All Hardgoods

This is one of the major conclusions reported in a recent study of Management Horizons, a marketing research and management consulting firm which specializes in retailing and consumer goods distribution. The study, **Locational Patterns for Hardgoods Purchasing,** was published for Management Horizons' clients as a part of the consulting firm's ongoing research program dealing with consumers' retail shopping behavior. For this study, hardgoods were grouped into three different categories:

- Leisure, recreation and hobby merchandise;
- Home furnishings and equipment;
- Hardware, lawn and garden and auto merchandise.

As reported by authors Sally Haviland and Tom Murnane, "Generally speaking, consumers purchase higher price-point hardgoods items in freestanding types of stores (discount stores, catalog showrooms, etc.) than in any other type of store." For instance, the average ticket amount of all hardgood items purchases made in freestanding types of stores was $63.84, whereas the ticket amount for these goods purchased in all locations averaged $48.36.

Age as factor

In examining specific demographic segments, the report stated that young adults (18-25 years of age) and older consumers (over the age of 65) make a significantly greater percentage of hardgoods purchases downtown than any other groups. This is supported by the fact that the 18-25 age group makes 21.3% of all their hardgoods purchases downtown, while the comparable figure for the over 65 age group was found to be 20.7%.

The Management Horizons study also found that men make a greater percentage of hardgoods purchases in freestanding types of stores than women. In fact, men make 25.4% of their hardgoods purchases in these types of stores, while the comparable figure for women is only 17.5%. Women tend to make more of their hardgood purchases in enclosed suburban malls and localized shopping centers than men. Specifically, women make 60.7% of all their hardgoods purchases in these two types of locations, while men make only 52.6%.

Data on income levels

Other findings in the study include: "Lower income consumers make a considerably greater percentage of their hardgoods purchases downtown than any other income group. The less-than-median-income group makes 21.0% of their hardgoods purchases downtown, while the median- to two-times-median-income group makes 12.8%. and the over-two-times-median-income group makes only 12.4%."

Management Horizons' RIS (Retail Intelligence System) is a unique and ongoing research program designed to help client companies respond to the challenge of:

- Ever changing consumer and competitive markets;
- Improving productivity strategy;
- New standards of corporate growth and profitability.

Clients are continually updated on trends, innovations, discoveries and developments in retailing through periodic publications.

FEEDBACK

Parts markup criticized

I am president of a small outdoor power equipment store in a suburb of Toledo, Ohio. We gross a little over $250,000.00 a year with our sales and service and have been in business eight years.

I would like to reach all the Presidents of companies like Toro, Ariens, Power Products, and Poulan/Weedeater, with a message from our business as a dealer of their product. I don't feel that a 40% markup on parts is enough for us to make a decent profit. In most cases that margin of markup has to include UPS charges or our labor and transportation to pick up the parts from a Distributor who is on the other side of town from us. The price lists that are furnished by the manufacturers are nearly all based on a 40% markup and are only a guide for us to use. It's hard to get our personnel to add 5% or 10% to a price every time we sell something over the counter or in the service shop. I would ask the manufacturers when they print the price lists to give us three columns (schedules) which would reflect 40%, 50%, and 60%. We could then direct our personnel to use whichever column (schedule) we felt would give us a decent return on our investment in their parts. I would like to reflect that other industries operate on greater margins than that. For example jewelry is sold at a 100% markup. I have enclosed a copy of a price list furnished us by one of our suppliers and is used by us for belts.*

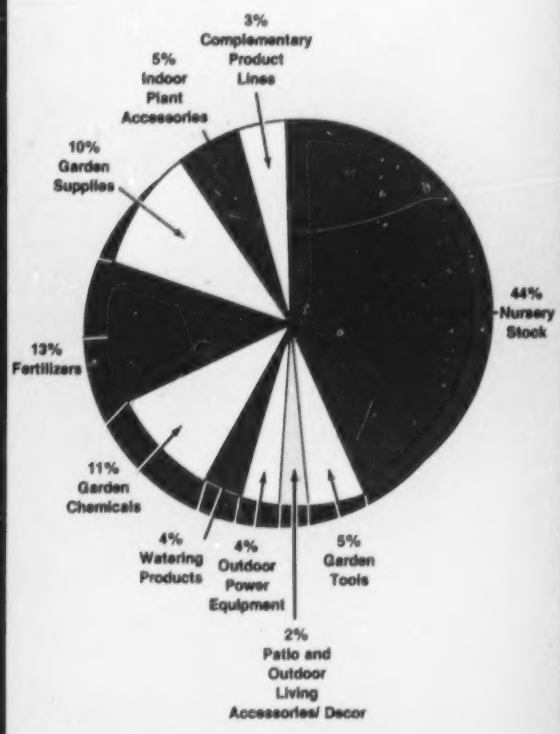
OPEI should be a forum for ideas from dealers as well as manufacturers and I would like to know if you can help us with this suggestion? Your effort will be appreciated by all the dealers across the country.

Merle H. Smith
President
Mini-Engine, Inc.
Perrysburg, OH

*Editor's note: Mr. Smith enclosed price lists for wedge-type and V-type belts for lawn and garden equipment.

Table 1.
Outdoor Power Equipment Dealers
(Specialists in retailing lawn, garden and grounds-care equipment)

Table 2.
Garden Centers
(Full-line garden centers, retail nurseries)



Profile of lawn and garden retailers

Using sales volume from their product lines as a measure, this report shows an industry profile of four categories of retailers who handle lawn/garden/patio merchandise. The data are based on a *Lawn & Garden Marketing* survey.

■The almost total dependence by the outdoor power equipment specialty retailers on sales of this single line of merchandise has been documented anew in a survey completed by this publication. Survey data presented here show that 94 percent of their sales volume is from power equipment. (See Table 1.) Previous studies by **Lawn & Garden Marketing** showed this concentration of effort by the power equipment shops to be the rule in the mid-1970's. Despite early warning signals during those boom years that some equipment retailers needed to diversify, only a small percentage moved to take on non-power lines.

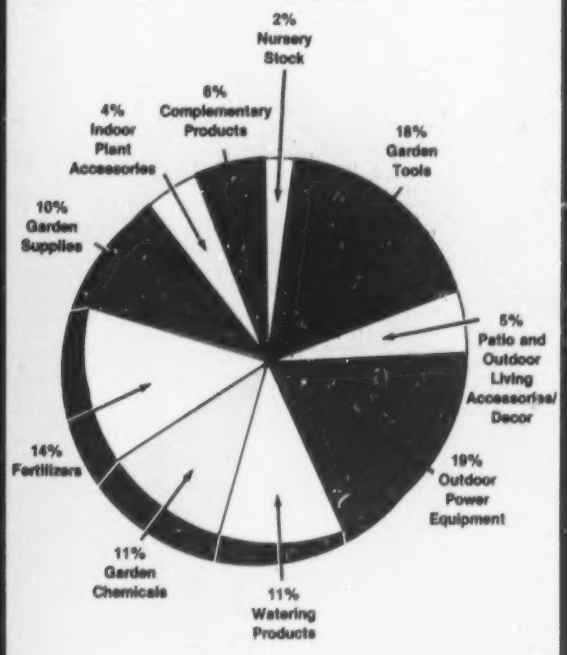
The retailing classification evolving out of the "green goods" category was able to diversify more readily. (See Table 2, Garden Centers.) The retailers under this retailing classification evolved from the retail nursery segment of the industry and were able to move more easily into selling chemicals, fertilizers, garden supplies, tools, etc. These lines proved to be good tie-in sales items to go along with the highly profitable nursery stock.

Comparing lawn and garden offerings

Despite some diversification it is apparent, however, that the income for retailers classified as "garden centers" is dependent to a great extent on sales of green goods, and that this retail segment remains vulnerable to changes in the marketplace which might be brought

Table 4.
Hardware/Home Centers

(Hardware stores, Home centers, Building supply/lumber stores)



on by weather, competitive pricing and shifts in consumer needs and preferences.

The multi-department stores—Sears, Montgomery Ward, J. C. Penney, TG&Y, K-Mart, Woolco, Woolworth, etc.—overall, have the most balanced offering of lawn, garden and patio lines, judging from this study.

The Hardware/Home Centers also have a diverse offering. Other sources and studies indicate that this type of retailer—a relative newcomer—is surpassing all others in rate of growth. These retailers with roots in, and input from, both the traditional hardware store and from the lumber and building supply store, have moved easily into these categories: garden tools, garden hose, accessories and other watering equipment items, barbecue grills, redwood and other wooden outdoor furniture, and decor. These are all fast-growing product lines.

Will the specialists diversify?

The specialization of efforts in merchandising some product lines has proved successful in certain areas for

continued...

Definition of 10 Product Groups

Nursery Stock—Trees, shrubs, ground covers, bedding plants, indoor plants, sod, seeds, bulbs, etc.

Garden Tools (non-power)—Shovels, rakes, cultivators, shears, edgers, sprayers, garden carts, wheelbarrows, spreaders, etc.

Patio and Outdoor Living Accessories/Decor—Outdoor cookery, lighting, trellises, patio furniture, fountains, pools, bug killers, bird houses/feeders, etc.

Outdoor Power Equipment—Mowers, tractors, snow removal equipment, tillers, trimmers, edgers, shredders, chain saws, log splitters, spin trimmers, etc.

Watering Products—Hose, sprinklers, nozzles, hose reels, irrigation systems/components, timers, drip irrigation products, etc.

Garden Chemicals—Pesticides, fungicides, herbicides, insecticides, etc.

Fertilizers—Organic and inorganic plant foods for lawn and garden

Garden Supplies—Mulches, soil amendments, bird seed, edging, gloves, stakes, ties, landscape chips, fencing, etc.

Indoor Plant Accessories—Potting soils, planters, plant food/chemicals, indoor lights, etc.

Complementary Products—Wood-burning stoves, fireplace accessories, pet supplies, mopeds, Christmas/holiday decor, etc.

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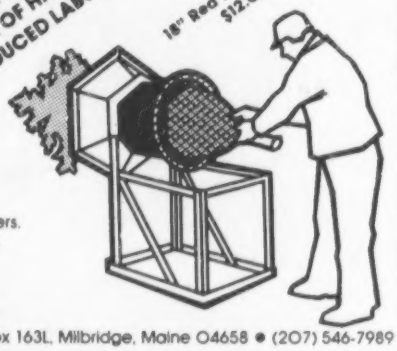
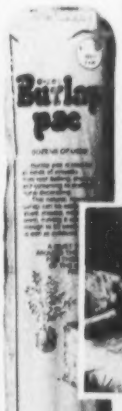


The complete supplier to Christmas tree growers and sellers. Send for our free catalog today.

Kelco INDUSTRIES Box 163L, Millbridge, Maine 04658 • (207) 546-7989

Circle (26) on Reply Card

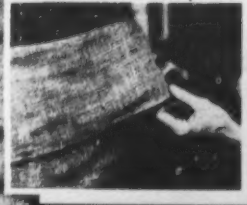
Proven control of Gypsy Moth with Eaton Burlap



1 Cut a piece approx. 18" wide by long enough to encircle tree trunk.

2 Tie the burlap to the tree with twine or wire.

3 Fold top half of the burlap down over lower half to provide a shelter area for the caterpillars.



4 Remove and destroy the caterpillars each day — replace burlap around the tree and repeat process.

Write
EATON BROTHERS CORP.
PO Box 80
Hamburg, New York 14075

Circle (27) on Reply Card

PEOPLE ON THE MOVE

Don Newhart has been named product manager for Acme Lawn and Garden Products, PBI/Gordon Corp.

Jim Forbes has been named national sales manager of the Weber-Stephen Products Co., Arlington Heights, Ill. **William Eby** replaces him as sales manager for the company's western territory.

Sydney C. Myers has been appointed national accounts sales manager for Charmglow Products, a division of Beatrice Foods Co.

Thomas J. Lesnett has been named marketing manager and **Edward J. Washburn** has been appointed as sales manager for the Stull Co., Coraopolis, Pa.

Dan Bush has been promoted to national sales manager for McCulloch Corp., Los Angeles, Calif.

Dudley Moss, Chicago, Ill., has been appointed to the newly created position of Midwest region manager for Dexol Industries.

Profile ...continued

some product lines. There will be some strong specialty retailers in the lawn and garden industry who will continue to thrive. But current trends in consumer buying habits and marketing trends in the U. S. indicate that in order to survive, those retailers represented in Table 1 will, in the future, show less than 94 percent of sales volume in outdoor power equipment. And the retailers represented in Table 2 will probably show increased volume in watering equipment, tools and other lawn and garden lines as well as complementary product lines.

If the hardware/home center retailers continue to expand in numbers, and to take on related product lines, the tables in future years may indicate some increase in the percentage of nursery stock as a share of total lawn and garden sales volume in the hardware/home centers.

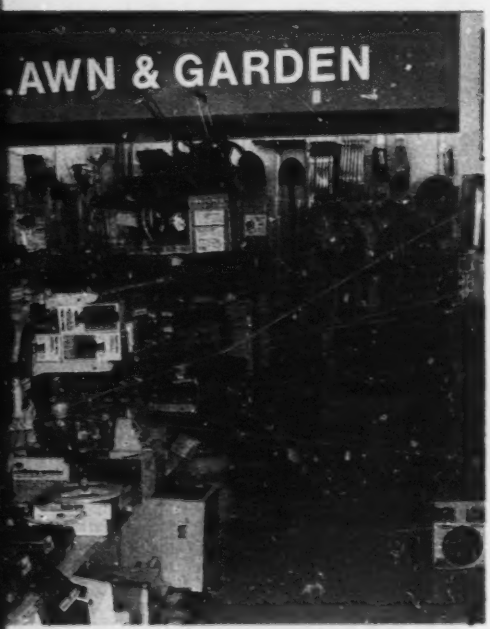
Will the specialty retailers change? There is an apparent need for specialty power equipment retailers. Some of those surviving the current crisis in that segment of the industry may continue to be highly specialized. Others in that category may remain primarily in power products but add other lines to ease problems of seasonality, climatic changes, and changes in consumer demands.

There are some excellent examples of garden center diversification around the country. Tables of data in the future may show less dependence on green goods. The number of strong, diversified garden centers will probably remain stable, or increase slowly. □

A new goal of retailers?

Smoothing the peaks in the purchasing cycle

Discussed here are some factors that might affect the purchasing calendar of major classes of lawn and garden products. The tables contain previously unpublished data from *Lawn & Garden Marketing*'s 1980 survey of retailers. In addition to the table above, there are 12 tables on the following pages showing data on specific product categories.



Hardware/home centers, with total number of stores surpassing other categories handling lawn and garden merchandise, are altering the peaks and valleys in the retailer purchasing cycle.

■Minimizing the dips in the *sales curve* has always been a big concern of lawn and garden retailers. They have been moderately successful in the past 10 years in their goals of reducing the peaks and valleys by adding product lines and by promoting earlier—and later—in the season.

Now it appears that many have targeted in on reducing the peaks in the *purchasing cycle*. It is a strategy reportedly being practiced by an increasing number of retailers in the current sell-in season. Will this strategy pass once the prime interest rates have dropped from the record-high levels of recent months?

Manufacturers report optimism for 1982 sales volume following a relatively good 1981 season for many product categories. But they report that more retailers are delaying purchase and delivery dates. At the recent big fall show held in Detroit by ACE Hardware, it was noted that more Ace members were deciding to forego the better discounts and drop shipments for the option to take delivery out of Ace warehouses.

The retailers who classify themselves as hardware stores or home centers, with membership in Ace, Cotter, HWI, etc., have enjoyed some advantage from the standpoint of being able to tailor buying cycles more closely to their needs. Data presented here shows the differences in the purchasing cycles of hardware/home centers and three other types of retailers.

Will more independent garden centers and power equipment dealers align themselves with the buying co-ops and other big organizations for better buying terms and other management assistance? A few garden centers have done this. A power equipment dealer described the difference that his recent association with Gamble's has meant. "I can now get two or three Lawn Boys at a time, at a better discount than I could get with

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Smoothing the peaks

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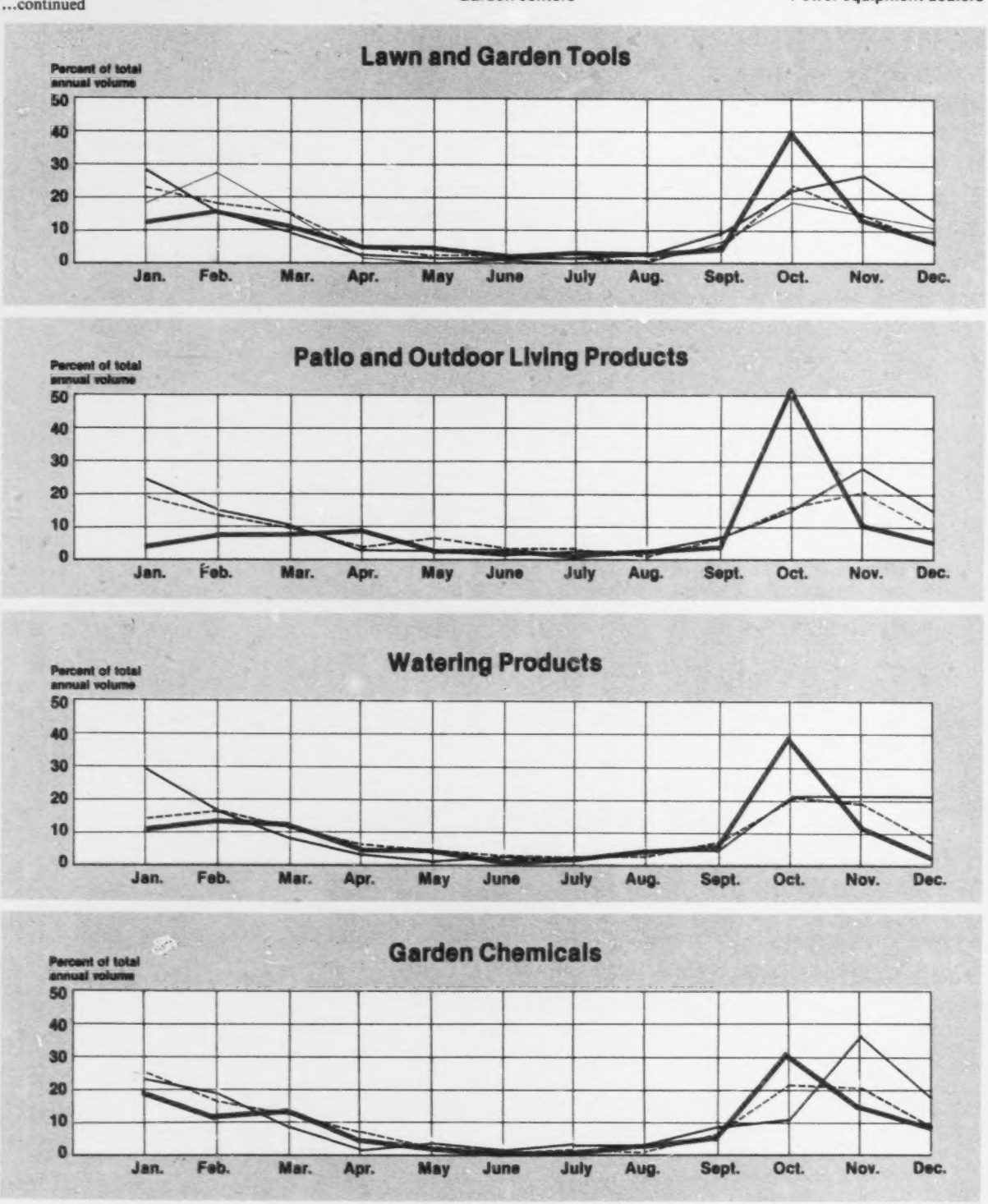

my volume purchases and early order discount through my Lawn Boy distributor." He also broadened his entire line and became a Gamble garden center.

Can manufacturers adjust their schedules to modify the peaks in purchasing cycles and lessen early commitment by the retail segment? At least one lawn and garden manufacturer theorized that it might be necessary for manufacturers to expand their production capacity to meet big orders from the retailing segment closer to the selling season.

Such a strategy would have to include an increased distribution capacity, also, he noted.

Does the question of smoothing the peaks in the purchasing cycle

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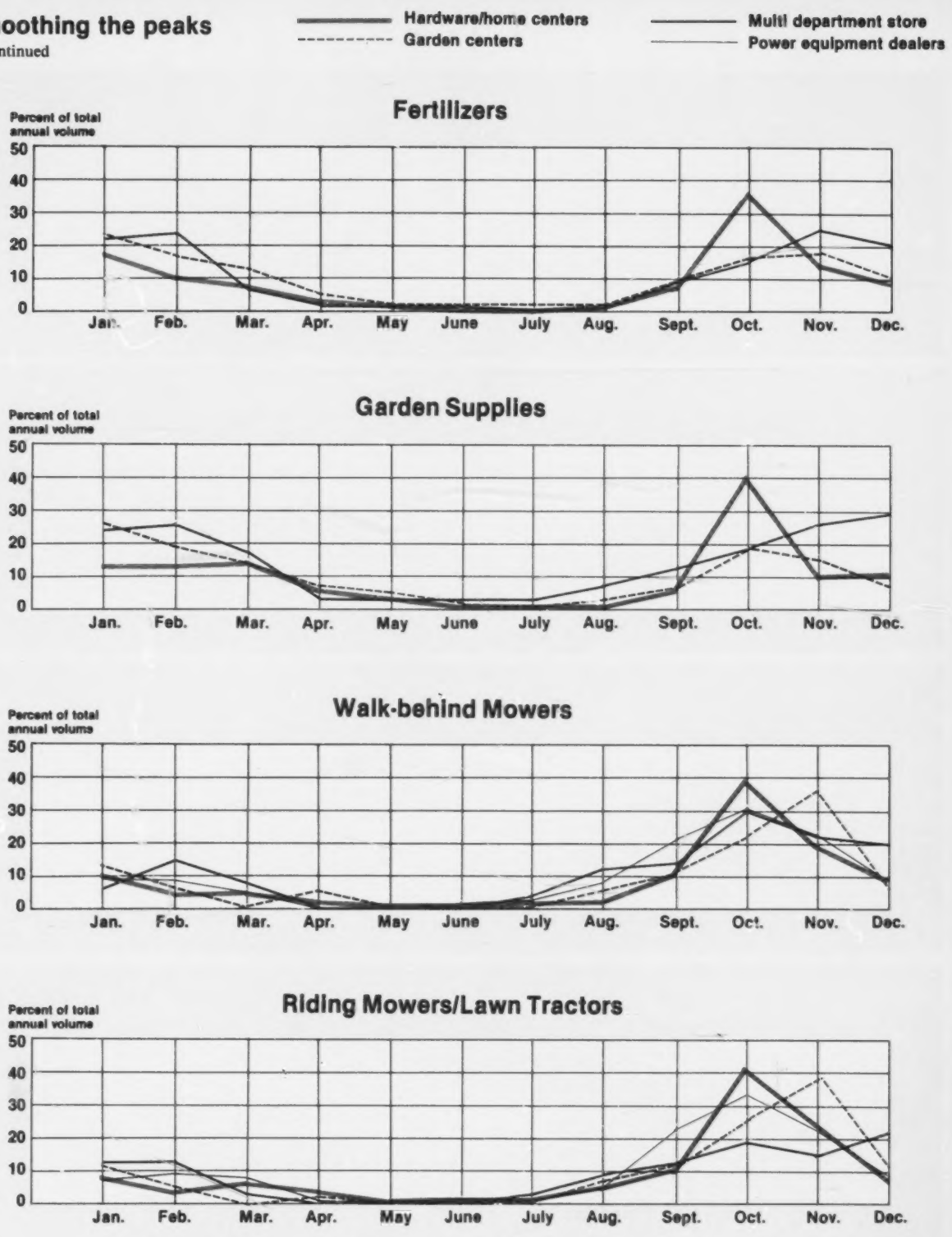

revolve solely around the possibility of reducing interest rates to a more tolerable level? No. There are other considerations, including changes in demands for product categories. For example, there is more emphasis on patio and outdoor living products such as patio grills, furniture, bug lights. There is an increased interest in vegetable gardening.

The merchandising base is being expanded: more stores are selling lawn and garden products. The customer base is being expanded: more women are getting involved in making the buying decisions, reflecting the increased number of women who are wage earners and who are using some of their income for lawn and garden purchases. The

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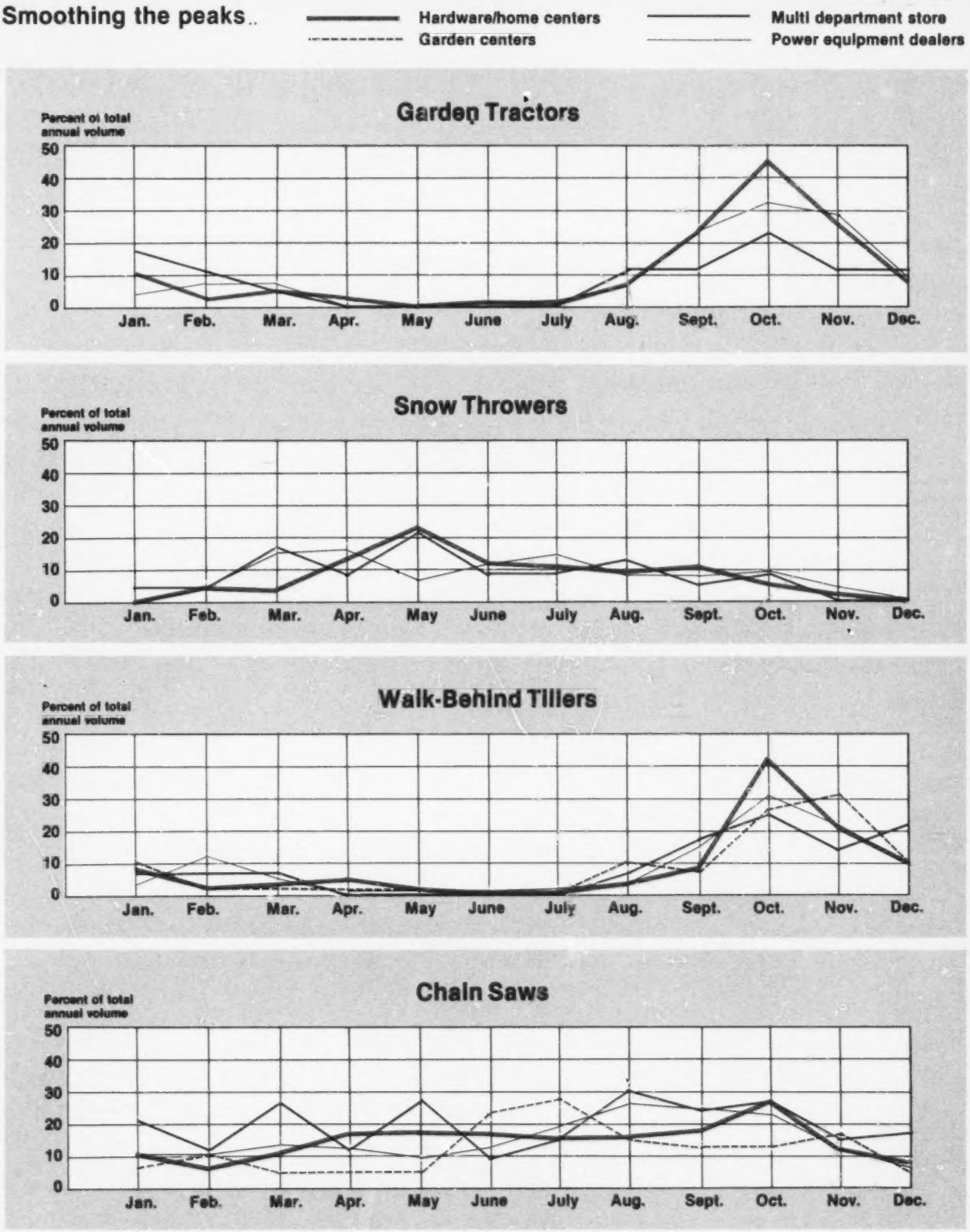

increased population in the Sun Belt states with their longer growing season, and patio living/entertaining season, also is an influence.

Timing of introduction of merchandise in the marketplace also may alter the look of the lawn and garden retailers' purchasing calendar. The American Hardware Manufacturers Assn., which recently announced the opening of a new hardware show in Las Vegas in February, 1983, said the decision to open the new show was based in part on serving the demands of the western market. The AHMA sponsors the National Hardware Show held in Chicago in August, which has been considered the "opening page" of the buying calendar each season. Is the calendar changing? □